

What our customers had to say:

"I have learnt a great deal today. I look forward to going back to the office tomorrow to use the Software " **Haynes Publishing**

"Excellent course (content and trainer). Addressed all the points I was told it would in more detail and more clearly than I thought would be possible. All in all, well worth the time" **The Jelf Group**

"This was a very good course and met my objectives" **Renishaw Plc**

"Very informative and well run" **Lloyds TSB Autolease**

- On line training
- Classroom training
- On site training
- Real time training



Aim

To ensure that users have an adequate understanding of the day to day basic functions of using Workbooks as a sales and client management tool to improve their productivity. The course is very much 'hands on' with plenty of real life exercises.

Pre-requisites

Attendees should already have a working knowledge of Windows and Windows applications like Word or any Database system.

Duration

Course is normally one full day - start time is 10.00am and we aim to finish around 4.30pm. Refreshments, provided throughout the day, and buffet lunch is included (If the course is held at the Wizard Systems Training Centre).

Why choose Wizard Systems?

- Training providers since 1993
- Courses are friendly, informal and run in small groups
- Plenty of hands on experience and exercises
- In training surveys 100% of attendees said they would recommend our training to others

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Agenda

Getting Started

- System overview
- Searching for records
- Navigation to Landing pages
- Working with Forms
- Tailor Screens
- Filtering Records
- Set your Preferences

Contact Management

- Adding new Organisations and People
- Creating employee relationships
- Adding Notes to records
- Creating Activities

Working with Leads

- Existing Leads
- New Leads and assigning
- Follow Up
- Converting Leads

Outlook Connector

- Overview
- Installing
- Configuration
- Day to Day use

Workbooks for Sales People

- Overview
- Tracking an Opportunity

Reports

- Overview
- Building a Simple Report
- Applying Criteria to Limit the Results
- Copying a Report
- Total Values using Formula
- Summarise Results by Sales Person
- Create Chart
- Add to dashboard

Workbooks Dropbox

- Integrating email with the Dropbox feature

